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| <b>EPA</b><br>United States Environmental Protection Agency<br>Washington, DC 20460<br><b>Work Assignment</b>   |  | Work Assignment Number<br>3-44   |
|   |  | <input type="checkbox"/> Other <input checked="" type="checkbox"/> Amendment Number:<br>000002 |
| Contract Number<br>EP-C-08-010  | Contract Period 12/16/2008 To 11/30/2012<br>Base                      Option Period Number 3   | Title of Work Assignment/SF Site Name<br>Tech Trans R&D Water Challenge                        |
| Contractor<br>SCIENTIFIC CONSULTING GROUP, INC, THE   |  | Specify Section and paragraph of Contract SOW<br>2.1,2.2,2.3                                   |
| Purpose: <input type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out<br><input checked="" type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding<br><input type="checkbox"/> Work Plan Approval |  | Period of Performance<br>From 01/09/2012 To 11/30/2012   |
| Comments:   |  |  |
| <input type="checkbox"/> Superfund                      Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund  |  |  |
| SFO (Max 2) <input type="checkbox"/> Note: To report additional accounting and appropriations data use EPA Form 1900-69A.   |  |  |
| Line  | DCN (Max 6)<br>Budget/FY (Max 4)<br>Appropriation Code (Max 6)<br>Budget Org/Code (Max 7)<br>Program Element (Max 9)<br>Object Class (Max 4) | Amount (Dollars)<br>(Cents)<br>Site/Project (Max 8)<br>Cost Org/Code (Max 7)                   |
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| Contract Period: 12/16/2008 To 11/30/2012<br>Cost/Fee:  |  | LOE:   |
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| Total:  |  |  |
| Work Plan / Cost Estimate Approvals   |  |  |
| Contractor WP Dated:  |  | Cost/Fee:                      LOE:  |
| Cumulative Approved:  |  | Cost/Fee:                      LOE:  |
| Work Assignment Manager Name Abby Waits<br>_____<br>(Signature)                      (Date)   |  | Branch/Mail Code:<br>Phone Number 513-569-7884<br>FAX Number: 513-569-7680                     |
| Project Officer Name Verla Sutton-Busby<br>_____<br>(Signature)                      (Date)   |  | Branch/Mail Code:<br>Phone Number: 202-564-6808<br>FAX Number:                                 |
| Other Agency Official Name<br>_____<br>(Signature)                      (Date)  |  | Branch/Mail Code:<br>Phone Number:<br>FAX Number:  |
| Contracting Official Name Renita Tyus<br>_____<br>(Signature)                      (Date)   |  | Branch/Mail Code:<br>Phone Number: 513-487-2094<br>FAX Number: 513-487-2109                    |

## **PERFORMANCE WORK STATEMENT**

**EPA Contract Number:** EP-C-08-010

**Contractor:** Scientific Consulting Group, Inc. (SCG)

**EPA Work Assignment Number:** 3-44

**Amendment No. 2**

**TITLE:** Technology Transfer in Support of Research and Development for Innovative Solutions to Water Challenges

**PERIOD OF PERFORMANCE:** Date of Issuance through November 30, 2012

**WORK ASSIGNMENT COR:** Abby Waits  
EPA/ORD/NRMRL/IO/ETAV  
26 W. Martin Luther King Drive, MS208A  
Cincinnati, OH 45268  
Tel: (513) 569-7884  
Fax: (513) 569-7158  
[Waits.abby@epa.gov](mailto:Waits.abby@epa.gov)

**PROJECT OFFICER COR:** Verla Sutton-Busby  
Mail Code: 8102R; 41165  
Tel: (202) 564-6808  
Fax: (202) 565-2910  
[Sutton-busby.verla@epa.gov](mailto:Sutton-busby.verla@epa.gov)

This work assignment has been amended as follows: one additional meeting has been added to Task 3 (up from 5 meetings to 6 meetings); all subtasks have been amended accordingly to account for the one additional meeting. The additional meeting will require onsite meeting support as outlined in Subtask 3.7. Note: support for this meeting is expected to be of the same level and scope as Meeting 3 in the contractor's Work Plan for Work Assignment 3-44, Amendment 1.

### **BACKGROUND**

Innovative technologies hold the key to cost-effective, timely solutions that protect human health and minimize adverse environmental effects. EPA's National Risk Management Research Laboratory (NRMRL) is providing support for water technology collaboration and transfer at EPA Cincinnati to advance the research, development, and deployment (RD&D) of innovative technologies. EPA Cincinnati's goal is to promote innovation in the national water technology sector through research and development, collaboration between internal and external partners, cluster support, technology transfer, and facilitation of intellectual property identification and protection. The outcomes will help EPA and the nation meet the needs identified in the EPA Drinking Water Strategy, Safe Drinking Water Act and Amendments, and Clean Water Act, as well as address other important water challenges, such as infrastructure, stormwater, nutrients, and wastewater management.

Beginning in 2010, EPA Cincinnati took the lead for a program that helped catalyze a public-private partnership focused on environmental technology innovation and commercialization. This charge follows the priorities of the EPA Administrator and the Agency's Chief Financial Officer to develop and deploy innovative environmental technologies in a manner that results in economic growth while protecting human health and the environment. These efforts are being accomplished in part through collaborative efforts involving a regional Water Technology Innovation Cluster (WTIC) in the Southwestern Ohio, Northern Kentucky, and Southeastern Indiana tri-state area.

In addition to advising the WTIC on environmental technology issues, EPA is working collaboratively with stakeholders in the region and nation-wide to provide research and insight for advancing improved environmental technologies and practices from proof-of-concept to development and implementation. As part of these efforts, EPA NRMRL has identified a need for informational workshops, webinars, and other activities to provide clarity on the needs and challenges that drive technology innovation; build opportunities for collaborative approaches to technology research, development, and deployment; and assist with the transfer of technologies from laboratory to implementation.

## **PURPOSE**

The purpose of this Performance Work Statement (PWS) is to define the steps that will be needed to provide technology collaboration and transfer support for workshop planning and coordination, webinars, and other activities related to EPA's role in advancing technology RD&D and coordination with the WTIC.

## **TASK DESCRIPTIONS**

The contractor shall furnish all personnel, material, equipment, and services necessary to perform the work outlined in the following tasks and subtasks.

### **TASK 1: Prepare Work Plan**

The contractor shall prepare a work plan and cost estimate in accordance with the terms and conditions of the contract. The contractor's work plan should contain a break-out clearly specifying estimates (LOE, ODCs, etc.) associated with performing each of the Tasks 1 through 5 as outlined in this PWS. Additionally, the contractor's work plan should contain:

- A breakout of LOE/costs per meeting for each of the **six (6)** meetings outlined in Task 3, and then per subtask under Task 3 (for each of the meetings)
- A breakout of LOE/costs per webinar for each of the two (2) webinars outlined in Task 4.

### **TASK 2: Work Assignment Kick-Off Meeting**

A work assignment kick-off meeting shall be conducted between the contractor project team, the EPA WA COR, EPA technical lead(s), and designated planning group members

to discuss project planning, details, activities, and timelines. The kick-off meeting shall be conducted via conference call within two (2) weeks of work assignment issuance. The contractor shall develop meeting minutes, including key discussion points, action items, and a schedule, and provide to the EPA WA COR.

### **TASK 3: Meeting Logistical Support**

In support of EPA's role in the WTIC and other related activities, EPA will be conducting multiple workshops, forums, and meetings to engage stakeholders, build collaborative relationships, and convey information related to technology research, development and implementation. The contractor shall provide logistical and technical meeting support as outlined in subtasks 3.1 through 3.8 below for up to six (6) meetings for a period of performance through November 30, 2012.

All meetings will be held between January 2012 and November 2012. Each meeting will last up to one-and-half (1 ½) days and will be held at meeting space in the Cincinnati-Dayton-Northern Kentucky region. Each of the meetings may include up to 100 participants.

Oversight of coordination for the meetings will be provided by the EPA WA COR and/or EPA technical lead(s) to be identified by the EPA WA COR once a contractor work plan has been approved. The EPA WA COR and EPA technical lead(s), as assigned, shall receive copies of all deliverables under these tasks. Once confirmed, date(s), topic, facility/location and specific logistical support needed (from among the following subtasks) for each meeting will be provided to the contractor via written technical direction from the EPA WA COR.

NOTE: For estimation purposes, EPA expects support required for each of these **six (6)** meetings to be similar in level of effort to support provided by the contractor for the EPA/WBI Water and Energy Nexus Technology Innovation Forum held in Dayton and Cincinnati, OH, on October 5-6, 2011 (under Contract EP-C-08-010, Work Assignment 2-44). Exceptions: EPA will not require an on-site note taker or meeting summary report for these meetings; and for **three (3) of the six (6) meetings**, EPA will require one (1) meeting coordinator to provide on-site meeting support (see subtask 3.7).

#### **TASK 3.1: Meeting Planning**

The contractor shall participate in conference calls with the EPA WA COR, EPA technical lead(s), and other planning group members. The contractor shall interact with EPA and other external planning group members to help synthesize and formulate meeting topics, agendas, and recommendations for expert speakers. The contractor shall develop interim meeting agendas and materials consistent with the planning group recommendations and short summaries of the topics discussed and any decisions or action items. The contractor shall also participate in periodic calls (approximately twice per week) with the EPA WA COR and/or EPA technical lead(s) to discuss progress and relevant technical issues related to the work assignment tasks. The contractor shall help recruit potential speakers and meeting participants as outlined in this PWS.

### **TASK 3.2: Pre-Meeting and Registration Materials**

For each meeting, the contractor shall develop draft and final agendas, announcements/invitations, speaker guidelines, logistical information sheets, and other materials as needed. The contractor shall provide draft versions of all materials to the EPA WA COR and/or EPA technical lead(s) for review and approval. Final electronic copies shall be sent in source file format (e.g., MSWord 2007) and \*.pdf. As necessary, the contractor shall develop 508 compliant .pdf files or .html versions of final materials for inclusion on a registration web site or other sites. In some cases, the contractor shall be responsible for uploading these materials to a registration web site or other related web sites, as access permits.

For each meeting, the contractor shall compile a spreadsheet or mailing list of email addresses for potential meeting participants. These lists shall include potential participants as provided by EPA; the lists may also include potential participants researched and identified by the contractor based on criteria supplied by EPA. The contractor shall distribute (via email) electronic invitations, agendas, logistical materials, and other pre-meeting informational materials to potential participants. The contractor shall forward hard-copy invitation materials only as needed.

The contractor shall develop an on-line registration system for tracking responses and registrant information for each meeting. The on-line system shall also include agendas, and other meeting or logistical information. The contractor shall make regular updates to the system to reflect changes in the agenda, schedule, logistics, etc., and shall post meeting-related announcements as available. The system may be linked to EPA or other relevant web sites as identified by the EPA WA COR. The contractor shall also manually enter responses into the registration system as needed. The contractor shall track responses to meeting invitations and monitor on-line registration, and shall provide the EPA WA COR or EPA technical lead(s) with regular updates on registration and responses. The contractor shall provide the EPA WA COR with materials to handle walk-in (non-preregistered) participants onsite at the meetings (see subtask 3.3 below).

### **TASK 3.3: Meeting Folders, Name Badges, and Other Materials/Handouts**

For each meeting, the contractor shall prepare up to 100 folders to distribute to meeting participants. The folders shall contain copies of final agendas, participant lists, speaker bios, and additional fact sheets as needed. Additionally, the folders may contain copies of available presentations, abstracts, evaluation forms, other newsletters or handouts, etc., as determined by the EPA WA COR or EPA technical lead(s). The contractor shall design and produce labels or covers for the folders. The contractor shall copy materials to be included in the folders; however, in some cases, EPA may provide materials that should be added to the folders. In addition to hard copy materials, the contractor shall be prepared to upload all final meeting materials to the workshop registration site and/or to provide materials to EPA for uploading on other web sites prior to the meeting.

For each meeting, the contractor shall develop name badges, exhibitor lists, directional signs, table tents, onsite registration lists and forms, sign-up sheets, evaluation forms, and other registration- and meeting-related materials, as needed. The contractor shall provide services for design and production of meeting-specific artwork and graphics to use on name badges, agenda, signage, posters, presentation templates, etc. The contractor shall provide copies of draft artwork and graphics to the EPA WA COR or EPA technical lead(s) for approval before final production.

The contractor shall ship all meeting materials specified in this subtask to the EPA WA COR or EPA technical lead(s) in advance of the meeting. The contractor shall track shipment of materials to ensure they arrive safely and in good condition to the designated EPA or facility addressee. The contractor shall provide return shipping information and supplies in the event that any materials need to be returned to the contractor by the EPA WA COR or EPA technical lead(s).

#### **TASK 3.4: Speaker Arrangements**

Prior to each meeting, the contractor shall provide support to identify and contact potential speakers, panel members, etc. The contractor shall initiate contact with speakers to determine willingness to participate and confirm availability, as needed. The contractor shall develop meeting-specific presentation templates (e.g., in PowerPoint) to provide to speakers [Note: presentation templates and associated graphics should be pre-approved by the EPA WA COR or EPA technical lead(s) as outlined for pre-meeting materials under subtasks 3.2 and 3.3 above]. The contractor shall provide written (email) guidance to and contact speakers for submission of electronic presentation materials (i.e., PowerPoint slides), abstracts, and short biographies as needed.

Once presentations and other speaker materials have been received, the contractor shall reformat as necessary for copying, uploading and distributing (or posting on web sites). The contractor shall make all speaker presentations available to the EPA WA COR or EPA technical lead(s) prior to the start of the meeting via CD-ROM or other appropriate electronic media (USB drive), or through email and/or an Internet file-sharing platform. The contractor shall notify speakers who do not submit their presentations prior to the meeting to bring a copy of their electronic file to the meeting.

As necessary following the meeting, the contractor shall make all presentation files 508 compliant for purpose of posting them to the meeting registration web site or other web sites as applicable. The contractor shall post 508 compliant presentations and other materials as specified by the EPA WA COR or EPA technical lead(s) to the meeting registration web site within one (1) week from the conclusion of the meeting. The contractor shall prepare and forward a CD-ROM containing all 508 compliant presentations and other materials from each meeting (abstracts, bios, presentations, etc.) to the EPA WA COR and EPA technical lead(s) within two (2) weeks from the conclusion of the workshop.

As necessary, the contractor shall obtain expert guest speakers to provide presentations relevant to the meeting topics and materials and based on expertise criteria provided by

EPA and planning group members. Details on the specific number of and criteria for expert speakers for each meeting will be provided via written technical direction from the EPA WA COR. The EPA WA COR or EPA technical lead(s) shall have final approval of guest speakers identified for each meeting. The contractor shall provide written guidance to speakers for submission of presentations and other materials as outlined above. The contractor's work plan shall include estimates to provide all costs associated with obtaining up to three (3) expert speakers to participate at meetings to be held in the Cincinnati-Dayton-Northern Kentucky region.

### **TASK 3.5: Remote Conferencing and Webinar Services**

For up to two (2) of the meetings identified in Task 3, the contractor shall arrange for webinar services to allow for off-site meeting participation. The contractor shall be responsible for hosting webinar events and materials or accessing a webinar service or site to manage these activities. The contractor shall send instructions for accessing any tele-, video-, or webinar conferencing to workshop participants and shall be responsible for uploading workshop materials and presentations to a registration web site or webinar service/site for access during the workshop. The contractor shall be responsible for tracking attendees who participate via webinar services and obtaining registration information from these participants.

### **TASK 3.6: Meeting Evaluation Reports**

For each meeting, the contractor shall prepare a brief summary report of comments received on evaluation forms from meeting participants. At each meeting, the completed evaluation forms will be collected by the EPA WA COR or EPA technical lead(s) and copies will be mailed to the contractor. The contractor shall provide an electronic copy of the source file (e.g., MSWord 2007) for the summary evaluation report to the EPA WA COR and EPA technical lead(s) within two (2) weeks from receipt of copies of the completed evaluation forms from the EPA WA COR or EPA technical lead (s).

### **TASK 3.7: Onsite Meeting Support**

For up to **three (3)** of the meetings identified in Task 3, the contractor shall provide one (1) meeting coordinator with experience in convening technical meetings and performing registration activities to provide on-site logistical support during the meeting. EPA will identify meetings requiring and on-site meeting coordinator via written technical direction from the EPA WA COR. For each of these three (3) meetings, the contractor shall provide all necessary onsite logistical support, including registering attendees, distributing name badges and other meeting materials, ensuring speakers are present, cueing speakers presentations, trouble-shooting with the facility, initiating remote or webinar conferencing capabilities, and other general logistical support needed for the meeting. The contractor shall coordinate with the meeting facility and onsite facility staff as appropriate. [Note: In the event that a meeting is to be held at an EPA or other Federally-owned or operated facility and that onsite facility staff are under contract to EPA or other Federal host organization, the contractor shall not initiate discussions with onsite facility staff until appropriate contract officer(s) approval and participation in

discussions is obtained, and until notification of approval is received from the EPA WA COR.]

For each of the **three (3)** meetings, the contractor shall be prepared to handle walk-in (non-preregistered) participants, including accommodating for onsite registration forms, blank name badges, etc. As applicable, the contractor shall update the final meeting participants list based on information collected during registration and forward to the EPA WA COR and EPA technical lead(s).

#### **TASK 3.8: Post-Meeting Support**

Within one (1) week of the conclusion of each meeting, the contractor shall prepare and forward the following deliverables to the EPA WA COR and EPA technical lead(s): one (1) CD-ROM (or other appropriate electronic media) containing the final post-meeting participants list (updated based on actual attendees and walk-in registrants), final versions of all agendas (formatted), final speaker and/or participant biographies (formatted), electronic copies of posters displayed at the workshop, sign-in sheets, presentation templates (formatted), onsite walk-in registration forms, and any other final materials from the meeting. The contractor shall assure post-meeting materials are updated and posted on the event registration web site as applicable.

#### **TASK 4: Webinar Support**

In addition to the meetings outlined in Task 3 above, the contractor shall provide logistical and technical support for up to two (2) webinars related to technology development and commercialization. Each webinar will be held between January 2012 and November 2012, will last up to one (1) day, and will include up to 150 participants. For each webinar, the contractor shall provide the following support:

- Make all necessary arrangements for setting up and conducting webinar services
- Host webinar events/materials on own site or provide access to a webinar service or site to manage these activities
- Develop draft and final invitations, agendas, logistical information sheets, and other materials for webinars, as needed; provide draft versions of all materials to the EPA WA COR and/or EPA technical lead(s) for review and approval
- Post .pdf or .html versions of final materials on the webinar site or other web sites
- Distribute (via email) electronic invitations, agendas, logistical materials, and other pre-webinar informational materials to potential participants
- Track participant responses and registrant information for webinars, e.g., through an on-line registration system or some other mechanism, and provide the EPA WA COR or EPA technical lead(s) with regular updates on confirmed participants for each webinar
- Develop guidelines for submission of webinar presentations to the contractor or uploaded directly to the webinar site and distribute guidelines to speakers
- Contact speakers for submission of presentation materials, abstracts, and short biographies as needed



- As needed, upload any speaker presentations, webinar materials, or other information to the webinar site or other web sites prior to the start of the webinar
- Send instructions for accessing webinar conferencing to participants
- Provide logistical support before and during webinars to ensure functionality and trouble-shoot in the event of any issues
- Provide one (1) effective note-taker to participate in webinars and record meeting minutes, summary points, action items, and discussion items.
- Prepare and forward an original and duplicate CD-ROM containing all presentation materials from each webinar (abstracts, bios, presentations, etc.) to the EPA WA COR and EPA technical lead(s) within one (1) week from the conclusion of the webinar
- Prepare a draft and final webinar summary report highlighting key points from presentations, discussion periods, question and answer sessions, and action items
- Submit electronic copies of the draft summary report (in source file format) to the EPA WA COR and EPA technical lead(s) and webinar presenters within one (1) week from the conclusion of each webinar, and the final summary report within three (3) weeks from conclusion of each webinar.

#### **TASK 5: Development of Technology Transfer Documents and Materials**

In keeping with NRMRL's goal of supporting the development and implementation of innovative technology solutions, the contractor shall provide support to develop, finalize and produce technology transfer documents and materials. These materials may include fact sheets, technical posters, handouts, or other general informational materials to inform others about EPA's collaborative approaches to technology research, development, and deployment and participation in the WTIC. In general, technical content for inclusion in these technology transfer documents and materials will be provided by the EPA WA COR or EPA technical lead(s) or can be synthesized from existing documents or resources. EPA anticipates that up to four (4) fact sheets/handouts (1-2 pages in length) and up to four (4) posters will need to be developed by the contractor.

The contractor shall submit electronic copies of all draft documents, posters or materials, in source file (e.g., InDesign, MSWord 2007) and \*.pdf formats, to the EPA WA COR and EPA technical lead(s) for initial review and comment. The contractor shall receive comments on draft materials, revise materials accordingly, and resubmit materials to the EPA WA COR and EPA technical lead(s) within one (1) week from receipt of comments. The contractor shall submit final, formatted materials to the EPA WA COR and EPA technical lead(s) electronically, in source file (e.g., MSWord 2007) and \*.pdf formats. The contractor shall have all materials edited prior to submitting to EPA. The contractor shall develop electronic copies of materials that are suitable for posting to EPA's WTIC web site as well as other WTIC related web sites. These electronic copies shall comply with Section 508 of the Rehabilitation Act, as well as any other standards or guidance set or required by EPA NRMRL.

## DELIVERABLES AND PROJECT SCHEDULE

All deliverables shall be submitted to the EPA WA COR according to the following schedule.

|  |   |
|--|---|
| <b>TASK 1: Prepare Work Plan</b>   |   |
| Work plan due  | In accordance with the contract clauses   |
| <b>TASK 2: Work Assignment Kick-Off Meeting</b>                                |   |
| Kick-off meeting (via conference call)   | Within two (2) weeks of work assignment issuance  |
| <b>TASK 3: Meeting Logistical Support</b>                                      |   |
| <b>On-going through 11/30/12</b>   |   |
| <b>Subtask 3.1: Meeting Planning</b>   | Commence immediately upon work plan approval; on-going through 11/30/12 for each of the six meetings per technical direction from EPA WA COR  |
| <b>Subtask 3.2: Pre-Meeting and Registration Materials</b>                     | On-going through 11/30/12 for each of the six meetings per technical direction from EPA WA COR  |
| <b>Subtask 3.3: Meeting Folders, Name Badges, and Other Materials/Handouts</b> | On-going through 11/30/12 for each of the six meetings per technical direction from EPA WA COR  |
| <b>Subtask 3.4: Speaker Arrangements</b>                                       | On-going through 11/30/12 for each of the six meetings per technical direction from EPA WA COR  |
|  | For each of six meetings: CD-ROM (or other media) containing 508 compliant presentations and other materials due within two (2) weeks from the conclusion of the meeting  |
|  | For each of six meetings: posting of 508 compliant presentations and other materials to the registration web site within one (1) week from the conclusion of the meeting  |
| <b>Subtask 3.5: Remote Conferencing and Webinar Services</b>                   | On-going through 11/30/12 for each of two meetings per technical direction from EPA WA COR  |
| <b>Subtask 3.6: Meeting Evaluation Reports</b>                                 | For each of six meetings: summary evaluation report due two (2) weeks from receipt of evaluation forms from EPA WA COR  |
| <b>Subtask 3.7: Onsite Meeting Support</b>                                     | On-going through 11/30/12 for each of three meetings per technical direction from EPA WA COR  |
| <b>Subtask 3.8: Post-Meeting Support</b>                                       | For each of six meetings: one (1) CD-ROM (or other media) containing final copies of participants list, agendas, biographies, posters, sign-in sheets, presentation templates, walk-in registration forms, and any other materials due within one (1) week from conclusion of meeting |

| <b>TASK 4: Webinar Support</b>   |  |
|--|--|
| Support for up to two (2) webinars   | On-going through 11/30/12 for each of two webinars per technical direction from EPA WA COR   |
|  | For each of two webinars: original and duplicate CD-ROM containing all presentation materials from each webinar due within one (1) week from conclusion of webinar |
|  | For each of two webinars: draft summary due one (1) week from conclusion of webinar; final summary report due three (3) weeks from conclusion of webinar           |
| <b>TASK 5: Development of Technology Transfer Documents and Materials</b>  |  |
| Development of materials, including fact sheets, posters, handouts, etc., up to four fact sheets/handouts and four posters | On-going through 11/30/12 per technical direction from EPA WA COR  |

## **DELIVERABLE ACCEPTANCE CRITERIA**

The following deliverable acceptance criteria will be used to assess deliverables submitted under Tasks 1 through 5 of this PWS.

All deliverables shall be submitted to the EPA WA COR according to schedule and in appropriate formats as outlined in the PWS. All electronic materials should be complete and of high production quality. Reports shall be edited by a technical editor prior to submission to the EPA WA COR. All electronic materials shall comply with Section 508 of the Rehabilitation Act, as well as any other standards or guidance provided through written technical direction from the EPA WA COR.

## **SPECIAL REPORTING**

The contractor's Monthly Progress Report shall include a detailed description of any technical direction issued by the EPA WA COR and accepted by the contractor. The contractor shall maintain a list of all accepted technical direction issued during the work assignment. The contractor's Monthly Progress Report shall also include a break-out of cumulative costs (LOE, ODCs, etc.) associated with performing each of the Tasks 1 through 5 as outlined in this PWS. Additionally, the contractor's progress report shall include:

- A breakout of LOE/costs per meeting for each of the **six (6)** meetings outlined in Task 3, and then per subtask under Task 3 (for each of the meetings)
- A breakout of LOE/costs per webinar for each of the two (2) webinars outlined in Task 4.

## **MANAGEMENT CONTROLS**

Technical direction will be provided by the EPA WA COR throughout performance of the PWS. Periodic meetings between the EPA WA COR and contractor are encouraged to discuss any questions that may arise during the performance or completion of this work assignment. At the EPA WA COR's discretion, these meetings may occur via teleconference or video conferences. The contractor shall document these meetings and submit copies of this correspondence to the EPA WA COR.

The EPA WA COR may identify one or more EPA technical lead(s) for this work assignment. Interaction between the contractor and any EPA technical lead(s) designated by the EPA WA COR is solely for the purpose of presenting and discussing the information, analyses, results or presentations related to this work assignment. The interaction will be technical communication, not technical direction. Per the technical direction clause EPAAR 1552.237-71 of the contract, the EPA PO COR and the EPA WA COR or alternate EPA WA COR are the only representatives of the CO authorized to provide technical direction.

In all meetings, conferences, symposia, etc. participated in as a part of satisfying the terms of this work assignment, contractor personnel shall be clearly identified through the use of name badges that indicate their corporate affiliation. Contractor personnel shall clearly identify themselves as contractors when contacting workshop participants, speakers or other individuals or organizations during the performance of this effort.

The contractor shall ensure that the work done under this project does not contain any real or apparent personal or organizational conflicts of interest.

The contractor shall maintain the confidentiality of any confidential business information collected as part of this effort.

The contractor shall comply with Government Printing Office guidelines during the performance of this effort.

The contractor shall comply with Paperwork Reduction Act guidelines during the performance of this effort.

The contractor shall inform the EPA WA COR verbally or in writing within two (2) businesses day if any significant problems arise, as well as any corrective actions and potential impacts on project deliverables, costs, etc.

## **TRAVEL**

Per the contract clause Local LC-31-08, Approval of Contractor Travel, any non-local travel directly chargeable to this work assignment shall be submitted and approved by the proposed travel dates as identified by the EPA WA COR via technical direction. It is expected that the contractor will be requested to participate at meetings to be held in the Cincinnati-Dayton-Northern Kentucky region between January 2012 and November 2012.

|   |                |  |                               |                            |                            |  |                  |         |                         |                          |
|---|----------------|--|-------------------------------|----------------------------|----------------------------|--|------------------|---------|-------------------------|--------------------------|
| <b>EPA</b><br>United States Environmental Protection Agency<br>Washington, DC 20460<br><b>Work Assignment</b>   |                |  |                               |                            |                            | Work Assignment Number<br>3-44   |                  |         |                         |                          |
|   |                |  |                               |                            |                            | <input type="checkbox"/> Other <input checked="" type="checkbox"/> Amendment Number:<br>000001 |                  |         |                         |                          |
| Contract Number<br>EP-C-08-010  |                | Contract Period   12/16/2008   To   11/30/2012                 |                               |                            |                            | Title of Work Assignment/SF Site Name<br>Tech Trans R&D Water Challenge                        |                  |         |                         |                          |
| Contractor<br>SCIENTIFIC CONSULTING GROUP, INC, THE   |                | Specify Section and paragraph of Contract SOW<br>2.1, 2.2, 2.3 |                               |                            |                            |  |                  |         |                         |                          |
| Purpose: <input type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out<br><input checked="" type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding<br><input type="checkbox"/> Work Plan Approval |                |  |                               |                            |                            | Period of Performance<br><br>From   01/09/2012   To   11/30/2012                               |                  |         |                         |                          |
| Comments:   |                |  |                               |                            |                            |  |                  |         |                         |                          |
| <input type="checkbox"/> Superfund    Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund  |                |  |                               |                            |                            |  |                  |         |                         |                          |
| SFO (Max 2) <input type="checkbox"/> Note: To report additional accounting and appropriations data use EPA Form 1900-69A.   |                |  |                               |                            |                            |  |                  |         |                         |                          |
| Line  | DCN<br>(Max 6) | Budget/FY<br>(Max 4)   | Appropriation<br>Code (Max 6) | Budget Org/Code<br>(Max 7) | Program Element<br>(Max 9) | Object Class<br>(Max 4)  | Amount (Dollars) | (Cents) | Site/Project<br>(Max 8) | Cost Org/Code<br>(Max 7) |
| 1   |                |  |                               |                            |                            |  |                  |         |                         |                          |
| 2   |                |  |                               |                            |                            |  |                  |         |                         |                          |
| 3   |                |  |                               |                            |                            |  |                  |         |                         |                          |
| 4   |                |  |                               |                            |                            |  |                  |         |                         |                          |
| 5   |                |  |                               |                            |                            |  |                  |         |                         |                          |
| Authorized Work Assignment Ceiling  |                |  |                               |                            |                            |  |                  |         |                         |                          |
| Contract Period:<br>12/16/2008   To   11/30/2012  |                | Cost/Fee:  |                               |                            |                            | LOE:   |                  |         |                         |                          |
| This Action:  |                |  |                               |                            |                            |  |                  |         |                         |                          |
| Total:  |                |  |                               |                            |                            |  |                  |         |                         |                          |
| Work Plan / Cost Estimate Approvals   |                |  |                               |                            |                            |  |                  |         |                         |                          |
| Contractor WP Dated:  |                |  |                               | Cost/Fee:                  |                            | LOE:   |                  |         |                         |                          |
| Cumulative Approved:  |                |  |                               | Cost/Fee:                  |                            | LOE:   |                  |         |                         |                          |
| Work Assignment Manager Name   Abby Waits   |                |  |                               |                            |                            | Branch/Mail Code:  |                  |         |                         |                          |
| _____<br>(Signature)  |                |  |                               |                            |                            | _____<br>(Date)  |                  |         |                         |                          |
| Project Officer Name   Verla Sutton-Busby   |                |  |                               |                            |                            | Phone Number   513-569-7884  |                  |         |                         |                          |
| _____<br>(Signature)  |                |  |                               |                            |                            | _____<br>(Date)  |                  |         |                         |                          |
| Other Agency Official Name  |                |  |                               |                            |                            | FAX Number: 513-569-7680   |                  |         |                         |                          |
| _____<br>(Signature)  |                |  |                               |                            |                            | _____<br>(Date)  |                  |         |                         |                          |
| Contracting Official Name   Renita Tyus   |                |  |                               |                            |                            | Branch/Mail Code:  |                  |         |                         |                          |
| _____<br>(Signature)  |                |  |                               |                            |                            | _____<br>(Date)  |                  |         |                         |                          |
|   |                |  |                               |                            |                            | Phone Number: 202-564-6808   |                  |         |                         |                          |
|   |                |  |                               |                            |                            | FAX Number:  |                  |         |                         |                          |
|   |                |  |                               |                            |                            | Branch/Mail Code:  |                  |         |                         |                          |
|   |                |  |                               |                            |                            | Phone Number: 513-487-2094   |                  |         |                         |                          |
|   |                |  |                               |                            |                            | FAX Number: 513-487-2109   |                  |         |                         |                          |

## **PERFORMANCE WORK STATEMENT**

**EPA Contract Number:** EP-C-08-010

**Contractor:** Scientific Consulting Group, Inc. (SCG)

**EPA Work Assignment Number:** 3-44

Amendment No. 1

**TITLE:** Technology Transfer in Support of Research and Development for Innovative Solutions to Water Challenges

**PERIOD OF PERFORMANCE:** Date of Issuance through November 30, 2012

**WORK ASSIGNMENT COR:** Abby Waits  
EPA/ORD/NRMRL/IO/ETAV  
26 W. Martin Luther King Drive, MS208A  
Cincinnati, OH 45268  
Tel: (513) 569-7884  
Fax: (513) 569-7158  
[Waits.abby@epa.gov](mailto:Waits.abby@epa.gov)

**PROJECT OFFICER COR:** Verla Sutton-Busby  
Mail Code: 8102R; 41165  
Tel: (202) 564-6808  
Fax: (202) 565-2910  
[Sutton-busby.verla@epa.gov](mailto:Sutton-busby.verla@epa.gov)

This work assignment has been amended as follows: Task 4 has been deleted; one meeting has been added to Task 3 (up from 4 meetings to 5 meetings) and the Subtasks 3-7 and 3-8 have been added to Task 3 to have the contractor provide on-site and post meeting support; Task 5 is now Task 4; and Task 6 is now Task 5. These changes have been reflected in the deliverables schedule.

## **BACKGROUND**

Innovative technologies hold the key to cost-effective, timely solutions that protect human health and minimize adverse environmental effects. EPA's National Risk Management Research Laboratory (NRMRL) is providing support for water technology collaboration and transfer at EPA Cincinnati to advance the research, development, and deployment (RD&D) of innovative technologies. EPA Cincinnati's goal is to promote innovation in the national water technology sector through research and development, collaboration between internal and external partners, cluster support, technology transfer, and facilitation of intellectual property identification and protection. The outcomes will help EPA and the nation meet the needs identified in the EPA Drinking Water Strategy, Safe Drinking Water Act and Amendments, and Clean Water Act, as well as address

other important water challenges, such as infrastructure, stormwater, nutrients, and wastewater management.

Beginning in 2010, EPA Cincinnati took the lead for a program that helped catalyze a public-private partnership focused on environmental technology innovation and commercialization. This charge follows the priorities of the EPA Administrator and the Agency's Chief Financial Officer to develop and deploy innovative environmental technologies in a manner that results in economic growth while protecting human health and the environment. These efforts are being accomplished in part through collaborative efforts involving a regional Water Technology Innovation Cluster (WTIC) in the Southwestern Ohio, Northern Kentucky, and Southeastern Indiana tri-state area.

In addition to advising the WTIC on environmental technology issues, EPA is working collaboratively with stakeholders in the region and nation-wide to provide research and insight for advancing improved environmental technologies and practices from proof-of-concept to development and implementation. As part of these efforts, EPA NRMRL has identified a need for informational workshops, webinars, and other activities to provide clarity on the needs and challenges that drive technology innovation; build opportunities for collaborative approaches to technology research, development, and deployment; and assist with the transfer of technologies from laboratory to implementation.

## **PURPOSE**

The purpose of this Performance Work Statement (PWS) is to define the steps that will be needed to provide technology collaboration and transfer support for workshop planning and coordination, webinars, and other activities related to EPA's role in advancing technology RD&D and coordination with the WTIC.

## **TASK DESCRIPTIONS**

The contractor shall furnish all personnel, material, equipment, and services necessary to perform the work outlined in the following tasks and subtasks.

### **TASK 1: Prepare Work Plan**

The contractor shall prepare a work plan and cost estimate in accordance with the terms and conditions of the contract. The contractor's work plan should contain a break-out clearly specifying estimates (LOE, ODCs, etc.) associated with performing each of the Tasks 1 through 5 as outlined in this PWS. Additionally, the contractor's work plan should contain:

- A breakout of LOE/costs per meeting for each of the five (5) meetings outlined in Task 3, and then per subtask under Task 3 (for each of the meetings)
- A breakout of LOE/costs per webinar for each of the two (2) webinars outlined in Task 4.

### **TASK 2: Work Assignment Kick-Off Meeting**

A work assignment kick-off meeting shall be conducted between the contractor project team, the EPA WA COR, EPA technical lead(s), and designated planning group members to discuss project planning, details, activities, and timelines. The kick-off meeting shall be conducted via conference call within two (2) weeks of work assignment issuance. The contractor shall develop meeting minutes, including key discussion points, action items, and a schedule, and provide to the EPA WA COR.

### **TASK 3: Meeting Logistical Support**

In support of EPA's role in the WTIC and other related activities, EPA will be conducting multiple workshops, forums, and meetings to engage stakeholders, build collaborative relationships, and convey information related to technology research, development and implementation. The contractor shall provide logistical and technical meeting support as outlined in subtasks 3.1 through 3.8 below for up to five (5) meetings for a period of performance through November 30, 2012.

All meetings will be held between January 2012 and November 2012. Each meeting will last up to one-and-a-half (1 ½) days and will be held at meeting space in the Cincinnati-Dayton-Northern Kentucky region. Each of the meetings may include up to 100 participants.

Oversight of coordination for the meetings will be provided by the EPA WA COR and/or EPA technical lead(s) to be identified by the EPA WA COR once a contractor work plan has been approved. The EPA WA COR and EPA technical lead(s), as assigned, shall receive copies of all deliverables under these tasks. Once confirmed, date(s), topic, facility/location and specific logistical support needed (from among the following subtasks) for each meeting will be provided to the contractor via written technical direction from the EPA WA COR.

NOTE: For estimation purposes, EPA expects support required for each of these five (5) meetings to be similar in level of effort to support provided by the contractor for the EPA/WBI Water and Energy Nexus Technology Innovation Forum held in Dayton and Cincinnati, OH, on October 5-6, 2011 (under Contract EP-C-08-010, Work Assignment 2-44). Exceptions: EPA will not require an on-site note taker or meeting summary report for these meetings; and for two (2) of the five (5) meetings, EPA will require one (1) meeting coordinator to provide on-site meeting support (see subtask 3.7).

### **TASK 3.1: Meeting Planning**

The contractor shall participate in conference calls with the EPA WA COR, EPA technical lead(s), and other planning group members. The contractor shall interact with EPA and other external planning group members to help synthesize and formulate meeting topics, agendas, and recommendations for expert speakers. The contractor shall develop interim meeting agendas and materials consistent with the planning group recommendations and short summaries of the topics discussed and any decisions or action items. The contractor shall also participate in periodic calls (approximately twice per week) with the EPA WA COR and/or EPA technical lead(s) to discuss progress and



relevant technical issues related to the work assignment tasks. The contractor shall help recruit potential speakers and meeting participants as outlined in this PWS.

### **TASK 3.2: Pre-Meeting and Registration Materials**

For each meeting, the contractor shall develop draft and final agendas, announcements/invitations, speaker guidelines, logistical information sheets, and other materials as needed. The contractor shall provide draft versions of all materials to the EPA WA COR and/or EPA technical lead(s) for review and approval. Final electronic copies shall be sent in source file format (e.g., MSWord 2007) and \*.pdf. As necessary, the contractor shall develop 508 compliant .pdf files or .html versions of final materials for inclusion on a registration web site or other sites. In some cases, the contractor shall be responsible for uploading these materials to a registration web site or other related web sites, as access permits.

For each meeting, the contractor shall compile a spreadsheet or mailing list of email addresses for potential meeting participants. These lists shall include potential participants as provided by EPA; the lists may also include potential participants researched and identified by the contractor based on criteria supplied by EPA. The contractor shall distribute (via email) electronic invitations, agendas, logistical materials, and other pre-meeting informational materials to potential participants. The contractor shall forward hard-copy invitation materials only as needed.

The contractor shall develop an on-line registration system for tracking responses and registrant information for each meeting. The on-line system shall also include agendas, and other meeting or logistical information. The contractor shall make regular updates to the system to reflect changes in the agenda, schedule, logistics, etc., and shall post meeting-related announcements as available. The system may be linked to EPA or other relevant web sites as identified by the EPA WA COR. The contractor shall also manually enter responses into the registration system as needed. The contractor shall track responses to meeting invitations and monitor on-line registration, and shall provide the EPA WA COR or EPA technical lead(s) with regular updates on registration and responses. The contractor shall provide the EPA WA COR with materials to handle walk-in (non-preregistered) participants onsite at the meetings (see subtask 3.3 below).

### **TASK 3.3: Meeting Folders, Name Badges, and Other Materials/Handouts**

For each meeting, the contractor shall prepare up to 100 folders to distribute to meeting participants. The folders shall contain copies of final agendas, participant lists, speaker bios, and additional fact sheets as needed. Additionally, the folders may contain copies of available presentations, abstracts, evaluation forms, other newsletters or handouts, etc., as determined by the EPA WA COR or EPA technical lead(s). The contractor shall design and produce labels or covers for the folders. The contractor shall copy materials to be included in the folders; however, in some cases, EPA may provide materials that should be added to the folders. In addition to hard copy materials, the contractor shall be prepared to upload all final meeting materials to the workshop registration site and/or to provide materials to EPA for uploading on other web sites prior to the meeting.

For each meeting, the contractor shall develop name badges, exhibitor lists, directional signs, table tents, onsite registration lists and forms, sign-up sheets, evaluation forms, and other registration- and meeting-related materials, as needed. The contractor shall provide services for design and production of meeting-specific artwork and graphics to use on name badges, agenda, signage, posters, presentation templates, etc. The contractor shall provide copies of draft artwork and graphics to the EPA WA COR or EPA technical lead(s) for approval before final production.

The contractor shall ship all meeting materials specified in this subtask to the EPA WA COR or EPA technical lead(s) in advance of the meeting. The contractor shall track shipment of materials to ensure they arrive safely and in good condition to the designated EPA or facility addressee. The contractor shall provide return shipping information and supplies in the event that any materials need to be returned to the contractor by the EPA WA COR or EPA technical lead(s).

#### **TASK 3.4: Speaker Arrangements**

Prior to each meeting, the contractor shall provide support to identify and contact potential speakers, panel members, etc. The contractor shall initiate contact with speakers to determine willingness to participate and confirm availability, as needed. The contractor shall develop meeting-specific presentation templates (e.g., in PowerPoint) to provide to speakers [Note: presentation templates and associated graphics should be pre-approved by the EPA WA COR or EPA technical lead(s) as outlined for pre-meeting materials under subtasks 3.2 and 3.3 above]. The contractor shall provide written (email) guidance to and contact speakers for submission of electronic presentation materials (i.e., PowerPoint slides), abstracts, and short biographies as needed.

Once presentations and other speaker materials have been received, the contractor shall reformat as necessary for copying, uploading and distributing (or posting on web sites). The contractor shall make all speaker presentations available to the EPA WA COR or EPA technical lead(s) prior to the start of the meeting via CD-ROM or other appropriate electronic media (USB drive), or through email and/or an Internet file-sharing platform. The contractor shall notify speakers who do not submit their presentations prior to the meeting to bring a copy of their electronic file to the meeting.

As necessary following the meeting, the contractor shall make all presentation files 508 compliant for purpose of posting them to the meeting registration web site or other web sites as applicable. The contractor shall post 508 compliant presentations and other materials as specified by the EPA WA COR or EPA technical lead(s) to the meeting registration web site within one (1) week from the conclusion of the meeting. The contractor shall prepare and forward a CD-ROM containing all 508 compliant presentations and other materials from each meeting (abstracts, bios, presentations, etc.) to the EPA WA COR and EPA technical lead(s) within two (2) weeks from the conclusion of the workshop.

As necessary, the contractor shall obtain expert guest speakers to provide presentations relevant to the meeting topics and materials and based on expertise criteria provided by EPA and planning group members. Details on the specific number of and criteria for expert speakers for each meeting will be provided via written technical direction from the EPA WA COR. The EPA WA COR or EPA technical lead(s) shall have final approval of guest speakers identified for each meeting. The contractor shall provide written guidance to speakers for submission of presentations and other materials as outlined above. The contractor's work plan shall include estimates to provide all costs associated with obtaining up to three (3) expert speakers to participate at meetings to be held in the Cincinnati-Dayton-Northern Kentucky region.

### **TASK 3.5: Remote Conferencing and Webinar Services**

For up to two (2) of the meetings identified in Task 3, the contractor shall arrange for webinar services to allow for off-site meeting participation. The contractor shall be responsible for hosting webinar events and materials or accessing a webinar service or site to manage these activities. The contractor shall send instructions for accessing any tele-, video-, or webinar conferencing to workshop participants and shall be responsible for uploading workshop materials and presentations to a registration web site or webinar service/site for access during the workshop. The contractor shall be responsible for tracking attendees who participate via webinar services and obtaining registration information from these participants.

### **TASK 3.6: Meeting Evaluation Reports**

For each meeting, the contractor shall prepare a brief summary report of comments received on evaluation forms from meeting participants. At each meeting, the completed evaluation forms will be collected by the EPA WA COR or EPA technical lead(s) and copies will be mailed to the contractor. The contractor shall provide an electronic copy of the source file (e.g., MSWord 2007) for the summary evaluation report to the EPA WA COR and EPA technical lead(s) within two (2) weeks from receipt of copies of the completed evaluation forms from the EPA WA COR or EPA technical lead (s).

### **TASK 3.7: Onsite Meeting Support**

For up to two (2) of the meetings identified in Task 3, the contractor shall provide one (1) meeting coordinator with experience in convening technical meetings and performing registration activities to provide on-site logistical support during the meeting. EPA will identify meetings requiring and on-site meeting coordinator via written technical direction from the EPA WA COR. For each of these two (2) meetings, the contractor shall provide all necessary onsite logistical support, including registering attendees, distributing name badges and other meeting materials, ensuring speakers are present, cueing speakers presentations, trouble-shooting with the facility, initiating remote or webinar conferencing capabilities, and other general logistical support needed for the meeting. The contractor shall coordinate with the meeting facility and onsite facility staff as appropriate. [Note: In the event that a meeting is to be held at an EPA or other Federally-owned or operated facility and that onsite facility staff are under contract to

EPA or other Federal host organization, the contractor shall not initiate discussions with onsite facility staff until appropriate contract officer(s) approval and participation in discussions is obtained, and until notification of approval is received from the EPA WA COR.]

For each of the two (2) meetings, the contractor shall be prepared to handle walk-in (non-preregistered) participants, including accommodating for onsite registration forms, blank name badges, etc. As applicable, the contractor shall update the final meeting participants list based on information collected during registration and forward to the EPA WA COR and EPA technical lead(s).

### **TASK 3.8: Post-Meeting Support**

Within one (1) week of the conclusion of each meeting, the contractor shall prepare and forward the following deliverables to the EPA WA COR and EPA technical lead(s): one (1) CD-ROM (or other appropriate electronic media) containing the final post-meeting participants list (updated based on actual attendees and walk-in registrants), final versions of all agendas (formatted), final speaker and/or participant biographies (formatted), electronic copies of posters displayed at the workshop, sign-in sheets, presentation templates (formatted), onsite walk-in registration forms, and any other final materials from the meeting. The contractor shall assure post-meeting materials are updated and posted on the event registration web site as applicable.

### **TASK 4: Webinar Support**

In addition to the meetings outlined in Task 3 above, the contractor shall provide logistical and technical support for up to two (2) webinars related to technology development and commercialization. Each webinar will be held between January 2012 and November 2012, will last up to one (1) day, and will include up to 150 participants. For each webinar, the contractor shall provide the following support:

- Make all necessary arrangements for setting up and conducting webinar services
- Host webinar events/materials on own site or provide access to a webinar service or site to manage these activities
- Develop draft and final invitations, agendas, logistical information sheets, and other materials for webinars, as needed; provide draft versions of all materials to the EPA WA COR and/or EPA technical lead(s) for review and approval
- Post .pdf or .html versions of final materials on the webinar site or other web sites
- Distribute (via email) electronic invitations, agendas, logistical materials, and other pre-webinar informational materials to potential participants
- Track participant responses and registrant information for webinars, e.g., through an on-line registration system or some other mechanism, and provide the EPA WA COR or EPA technical lead(s) with regular updates on confirmed participants for each webinar
- Develop guidelines for submission of webinar presentations to the contractor or uploaded directly to the webinar site and distribute guidelines to speakers

- Contact speakers for submission of presentation materials, abstracts, and short biographies as needed
- As needed, upload any speaker presentations, webinar materials, or other information to the webinar site or other web sites prior to the start of the webinar
- Send instructions for accessing webinar conferencing to participants
- Provide logistical support before and during webinars to ensure functionality and trouble-shoot in the event of any issues
- Provide one (1) effective note-taker to participate in webinars and record meeting minutes, summary points, action items, and discussion items.
- Prepare and forward an original and duplicate CD-ROM containing all presentation materials from each webinar (abstracts, bios, presentations, etc.) to the EPA WA COR and EPA technical lead(s) within one (1) week from the conclusion of the webinar
- Prepare a draft and final webinar summary report highlighting key points from presentations, discussion periods, question and answer sessions, and action items
- Submit electronic copies of the draft summary report (in source file format) to the EPA WA COR and EPA technical lead(s) and webinar presenters within one (1) week from the conclusion of each webinar, and the final summary report within three (3) weeks from conclusion of each webinar.

#### **TASK 5: Development of Technology Transfer Documents and Materials**

In keeping with NRMRL's goal of supporting the development and implementation of innovative technology solutions, the contractor shall provide support to develop, finalize and produce technology transfer documents and materials. These materials may include fact sheets, technical posters, handouts, or other general informational materials to inform others about EPA's collaborative approaches to technology research, development, and deployment and participation in the WTIC. In general, technical content for inclusion in these technology transfer documents and materials will be provided by the EPA WA COR or EPA technical lead(s) or can be synthesized from existing documents or resources. EPA anticipates that up to four (4) fact sheets/handouts (1-2 pages in length) and up to four (4) posters will need to be developed by the contractor.

The contractor shall submit electronic copies of all draft documents, posters or materials, in source file (e.g., InDesign, MSWord 2007) and \*.pdf formats, to the EPA WA COR and EPA technical lead(s) for initial review and comment. The contractor shall receive comments on draft materials, revise materials accordingly, and resubmit materials to the EPA WA COR and EPA technical lead(s) within one (1) week from receipt of comments. The contractor shall submit final, formatted materials to the EPA WA COR and EPA technical lead(s) electronically, in source file (e.g., MSWord 2007) and \*.pdf formats. The contractor shall have all materials edited prior to submitting to EPA. The contractor shall develop electronic copies of materials that are suitable for posting to EPA's WTIC web site as well as other WTIC related web sites. These electronic copies shall comply with Section 508 of the Rehabilitation Act, as well as any other standards or guidance set or required by EPA NRMRL.

#### **DELIVERABLES AND PROJECT SCHEDULE**

All deliverables shall be submitted to the EPA WA COR according to the following schedule.

|  |  |
|--|--|
| <b>TASK 1: Prepare Work Plan</b>   |  |
| Work plan due  | In accordance with the contract clauses  |
| <b>TASK 2: Work Assignment Kick-Off Meeting</b>                                |  |
| Kick-off meeting (via conference call)   | Within two (2) weeks of work assignment issuance   |
| <b>TASK 3: Meeting Logistical Support</b>                                      |  |
| <b>On-going through 11/30/12</b>   |  |
| <b>Subtask 3.1: Meeting Planning</b>   | Commence immediately upon work plan approval; on-going through 11/30/12 for each of the five meetings per technical direction from EPA WA COR  |
| <b>Subtask 3.2: Pre-Meeting and Registration Materials</b>                     | On-going through 11/30/12 for each of the five meetings per technical direction from EPA WA COR  |
| <b>Subtask 3.3: Meeting Folders, Name Badges, and Other Materials/Handouts</b> | On-going through 11/30/12 for each of the five meetings per technical direction from EPA WA COR  |
| <b>Subtask 3.4: Speaker Arrangements</b>                                       | On-going through 11/30/12 for each of the five meetings per technical direction from EPA WA COR  |
|  | For each of five meetings: CD-ROM (or other media) containing 508 compliant presentations and other materials due within two (2) weeks from the conclusion of the meeting  |
|  | For each of five meetings: posting of 508 compliant presentations and other materials to the registration web site within one (1) week from the conclusion of the meeting  |
| <b>Subtask 3.5: Remote Conferencing and Webinar Services</b>                   | On-going through 11/30/12 for each of two meetings per technical direction from EPA WA COR   |
| <b>Subtask 3.6: Meeting Evaluation Reports</b>                                 | For each of five meetings: summary evaluation report due two (2) weeks from receipt of evaluation forms from EPA WA COR  |
| <b>Subtask 3.7: Onsite Meeting Support</b>                                     | On-going through 11/30/12 for each of two meetings per technical direction from EPA WA COR   |
| <b>Subtask 3.8: Post-Meeting Support</b>                                       | For each of five meetings: one (1) CD-ROM (or other media) containing final copies of participants list, agendas, biographies, posters, sign-in sheets, presentation templates, walk-in registration forms, and any other materials due within one (1) week from conclusion of meeting |

| <b>TASK 4: Webinar Support</b>   |  |
|--|--|
| Support for up to two (2) webinars   | On-going through 11/30/12 for each of two webinars per technical direction from EPA WA COR   |
|  | For each of two webinars: original and duplicate CD-ROM containing all presentation materials from each webinar due within one (1) week from conclusion of webinar |
|  | For each of two webinars: draft summary due one (1) week from conclusion of webinar; final summary report due three (3) weeks from conclusion of webinar           |
| <b>TASK 5: Development of Technology Transfer Documents and Materials</b>  |  |
| Development of materials, including fact sheets, posters, handouts, etc., up to four fact sheets/handouts and four posters | On-going through 11/30/12 per technical direction from EPA WA COR  |

## **DELIVERABLE ACCEPTANCE CRITERIA**

The following deliverable acceptance criteria will be used to assess deliverables submitted under Tasks 1 through 5 of this PWS.

All deliverables shall be submitted to the EPA WA COR according to schedule and in appropriate formats as outlined in the PWS. All electronic materials should be complete and of high production quality. Reports shall be edited by a technical editor prior to submission to the EPA WA COR. All electronic materials shall comply with Section 508 of the Rehabilitation Act, as well as any other standards or guidance provided through written technical direction from the EPA WA COR.

## **SPECIAL REPORTING**

The contractor's Monthly Progress Report shall include a detailed description of any technical direction issued by the EPA WA COR and accepted by the contractor. The contractor shall maintain a list of all accepted technical direction issued during the work assignment. The contractor's Monthly Progress Report shall also include a break-out of cumulative costs (LOE, ODCs, etc.) associated with performing each of the Tasks 1 through 5 as outlined in this PWS. Additionally, the contractor's progress report shall include:

- A breakout of LOE/costs per meeting for each of the five (5) meetings outlined in Task 3, and then per subtask under Task 3 (for each of the meetings)
- A breakout of LOE/costs per webinar for each of the two (2) webinars outlined in Task 4.

## **MANAGEMENT CONTROLS**

Technical direction will be provided by the EPA WA COR throughout performance of the PWS. Periodic meetings between the EPA WA COR and contractor are encouraged to discuss any questions that may arise during the performance or completion of this work assignment. At the EPA WA COR's discretion, these meetings may occur via teleconference or video conferences. The contractor shall document these meetings and submit copies of this correspondence to the EPA WA COR.

The EPA WA COR may identify one or more EPA technical lead(s) for this work assignment. Interaction between the contractor and any EPA technical lead(s) designated by the EPA WA COR is solely for the purpose of presenting and discussing the information, analyses, results or presentations related to this work assignment. The interaction will be technical communication, not technical direction. Per the technical direction clause EPAAR 1552.237-71 of the contract, the EPA PO COR and the EPA WA COR or alternate EPA WA COR are the only representatives of the CO authorized to provide technical direction.

In all meetings, conferences, symposia, etc. participated in as a part of satisfying the terms of this work assignment, contractor personnel shall be clearly identified through the use of name badges that indicate their corporate affiliation. Contractor personnel shall clearly identify themselves as contractors when contacting workshop participants, speakers or other individuals or organizations during the performance of this effort.

The contractor shall ensure that the work done under this project does not contain any real or apparent personal or organizational conflicts of interest.

The contractor shall maintain the confidentiality of any confidential business information collected as part of this effort.

The contractor shall comply with Government Printing Office guidelines during the performance of this effort.

The contractor shall comply with Paperwork Reduction Act guidelines during the performance of this effort.

The contractor shall inform the EPA WA COR verbally or in writing within two (2) businesses day if any significant problems arise, as well as any corrective actions and potential impacts on project deliverables, costs, etc.

## **TRAVEL**

Per the contract clause Local LC-31-08, Approval of Contractor Travel, any non-local travel directly chargeable to this work assignment shall be submitted and approved by the proposed travel dates as identified by the EPA WA COR via technical direction.



|   |                |  |                               |                            |                            |                              |                  |         |                         |                          |
|---|----------------|--|-------------------------------|----------------------------|----------------------------|------------------------------|------------------|---------|-------------------------|--------------------------|
| <b>EPA</b><br>United States Environmental Protection Agency<br>Washington, DC 20460   |                | Work Assignment Number<br>3-44   |                               |                            |                            |                              |                  |         |                         |                          |
| <b>Work Assignment</b>  |                | <input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:                                |                               |                            |                            |                              |                  |         |                         |                          |
| Contract Number<br>EP-C-08-010  |                | Contract Period   12/16/2008   To   11/30/2012<br>Base                      Option Period Number       3 |                               |                            |                            |                              |                  |         |                         |                          |
| Contractor<br>SCIENTIFIC CONSULTING GROUP, INC, THE   |                | Title of Work Assignment/SF Site Name<br>Tech Trans R&D Water Challenge                                  |                               |                            |                            |                              |                  |         |                         |                          |
| Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out<br><input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding<br><input type="checkbox"/> Work Plan Approval |                | Period of Performance<br><br>From   01/09/2012   To   11/30/2012   |                               |                            |                            |                              |                  |         |                         |                          |
| Comments:   |                |  |                               |                            |                            |                              |                  |         |                         |                          |
| <input type="checkbox"/> Superfund                      Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund  |                |  |                               |                            |                            |                              |                  |         |                         |                          |
| SFO (Max 2) <input type="checkbox"/> Note: To report additional accounting and appropriations data use EPA Form 1900-69A.   |                |  |                               |                            |                            |                              |                  |         |                         |                          |
| Line  | DCN<br>(Max 6) | Budget/FY<br>(Max 4)   | Appropriation<br>Code (Max 6) | Budget Org/Code<br>(Max 7) | Program Element<br>(Max 9) | Object Class<br>(Max 4)      | Amount (Dollars) | (Cents) | Site/Project<br>(Max 8) | Cost Org/Code<br>(Max 7) |
| 1   |                |  |                               |                            |                            |                              |                  |         |                         |                          |
| 2   |                |  |                               |                            |                            |                              |                  |         |                         |                          |
| 3   |                |  |                               |                            |                            |                              |                  |         |                         |                          |
| 4   |                |  |                               |                            |                            |                              |                  |         |                         |                          |
| 5   |                |  |                               |                            |                            |                              |                  |         |                         |                          |
| Authorized Work Assignment Ceiling  |                |  |                               |                            |                            |                              |                  |         |                         |                          |
| Contract Period:  |                | Cost/Fee:  |                               | LOE:                       |                            |                              |                  |         |                         |                          |
| 12/16/2008   To   11/30/2012  |                |  |                               |                            |                            |                              |                  |         |                         |                          |
| This Action:  |                |  |                               |                            |                            |                              |                  |         |                         |                          |
| Total:  |                |  |                               |                            |                            |                              |                  |         |                         |                          |
| Work Plan / Cost Estimate Approvals   |                |  |                               |                            |                            |                              |                  |         |                         |                          |
| Contractor WP Dated:  |                |  |                               | Cost/Fee:                  |                            | LOE:                         |                  |         |                         |                          |
| Cumulative Approved:  |                |  |                               | Cost/Fee:                  |                            | LOE:                         |                  |         |                         |                          |
| Work Assignment Manager Name   Abby Waits   |                |  |                               |                            |                            | Branch/Mail Code:            |                  |         |                         |                          |
| _____<br>(Signature)  |                |  |                               |                            |                            | _____<br>(Date)              |                  |         |                         |                          |
| Project Officer Name   Verla Sutton-Busby   |                |  |                               |                            |                            | Branch/Mail Code:            |                  |         |                         |                          |
| _____<br>(Signature)  |                |  |                               |                            |                            | _____<br>(Date)              |                  |         |                         |                          |
| Other Agency Official Name  |                |  |                               |                            |                            | Branch/Mail Code:            |                  |         |                         |                          |
| _____<br>(Signature)  |                |  |                               |                            |                            | _____<br>(Date)              |                  |         |                         |                          |
| Contracting Official Name   Renita Tyus   |                |  |                               |                            |                            | Branch/Mail Code:   CPOD     |                  |         |                         |                          |
| _____<br>(Signature)  |                |  |                               |                            |                            | _____<br>(Date)              |                  |         |                         |                          |
|   |                |  |                               |                            |                            | Phone Number:   513-487-2094 |                  |         |                         |                          |
|   |                |  |                               |                            |                            | FAX Number:   513-487-2109   |                  |         |                         |                          |

## **PERFORMANCE WORK STATEMENT**

**EPA Contract Number:** EP-C-08-010

**Contractor:** Scientific Consulting Group, Inc. (SCG)

**EPA Work Assignment Number:** 3-44

**TITLE:** Technology Transfer in Support of Research and Development for Innovative Solutions to Water Challenges

**PERIOD OF PERFORMANCE:** Date of Issuance through November 30, 2012

**WORK ASSIGNMENT COR:** Abby Waits  
EPA/ORD/NRMRL/IO/ETAV  
26 W. Martin Luther King Drive, MS208A  
Cincinnati, OH 45268  
Tel: (513) 569-7884  
Fax: (513) 569-7158  
[Waits.abby@epa.gov](mailto:Waits.abby@epa.gov)

**PROJECT OFFICER COR:** Verla Sutton-Busby  
Mail Code: 8102R; 41165  
Tel: (202) 564-6808  
Fax: (202) 565-2910  
[Sutton-busby.verla@epa.gov](mailto:Sutton-busby.verla@epa.gov)

### **BACKGROUND**

Innovative technologies hold the key to cost-effective, timely solutions that protect human health and minimize adverse environmental effects. EPA's National Risk Management Research Laboratory (NRMRL) is providing support for water technology collaboration and transfer at EPA Cincinnati to advance the research, development, and deployment (RD&D) of innovative technologies. EPA Cincinnati's goal is to promote innovation in the national water technology sector through research and development, collaboration between internal and external partners, cluster support, technology transfer, and facilitation of intellectual property identification and protection. The outcomes will help EPA and the nation meet the needs identified in the EPA Drinking Water Strategy, Safe Drinking Water Act and Amendments, and Clean Water Act, as well as address other important water challenges, such as infrastructure, stormwater, nutrients, and wastewater management.

Beginning in 2010, EPA Cincinnati took the lead for a program that helped catalyze a public-private partnership focused on environmental technology innovation and commercialization. This charge follows the priorities of the EPA Administrator and the Agency's Chief Financial Officer to develop and deploy innovative environmental technologies in a manner that results in economic growth while protecting human health

and the environment. These efforts are being accomplished in part through collaborative efforts involving a regional Water Technology Innovation Cluster (WTIC) in the Southwestern Ohio, Northern Kentucky, and Southeastern Indiana tri-state area.

In addition to advising the WTIC on environmental technology issues, EPA is working collaboratively with stakeholders in the region and nation-wide to provide research and insight for advancing improved environmental technologies and practices from proof-of-concept to development and implementation. As part of these efforts, EPA NRMRL has identified a need for informational workshops, webinars, and other activities to provide clarity on the needs and challenges that drive technology innovation; build opportunities for collaborative approaches to technology research, development, and deployment; and assist with the transfer of technologies from laboratory to implementation.

## **PURPOSE**

The purpose of this Performance Work Statement (PWS) is to define the steps that will be needed to provide technology collaboration and transfer support for workshop planning and coordination, webinars, and other activities related to EPA's role in advancing technology RD&D and coordination with the WTIC.

## **TASK DESCRIPTIONS**

The contractor shall furnish all personnel, material, equipment, and services necessary to perform the work outlined in the following tasks and subtasks.

### **TASK 1: Prepare Work Plan**

The contractor shall prepare a work plan and cost estimate in accordance with the terms and conditions of the contract. The contractor's work plan should contain a break-out clearly specifying estimates (LOE, ODCs, etc.) associated with performing each of the Tasks 1 through 6 as outlined in this PWS. Additionally, the contractor's work plan should contain:

- A breakout of LOE/costs per meeting for each of the four (4) meetings outlined in Task 3, and then per subtask under Task 3 (for each of the meetings)
- A breakout of LOE/costs for the workshop outlined in Task 4, which should include LOE/costs associated with each subtask under both Tasks 3 and 4
- A breakout of LOE/costs per webinar for each of the two (2) webinars outlined in Task 5.

### **TASK 2: Work Assignment Kick-Off Meeting**

A work assignment kick-off meeting shall be conducted between the contractor project team, the EPA WA COR, EPA technical lead(s), and designated planning group members to discuss project planning, details, activities, and timelines. The kick-off meeting shall be conducted via conference call within two (2) weeks of work assignment issuance. The contractor shall develop meeting minutes, including key discussion points, action items, and a schedule, and provide to the EPA WA COR.

### **TASK 3: Meeting Logistical Support**

In support of EPA's role in the WTIC and other related activities, EPA will be conducting multiple workshops, forums, and meetings to engage stakeholders, build collaborative relationships, and convey information related to technology research, development and implementation. The contractor shall provide logistical and technical meeting support as outlined in subtasks 3.1 through 3.6 below for up to four (4) meetings for a period of performance through November 30, 2012.

All meetings will be held between January 2012 and November 2012. Each meeting will last up to one-and-half (1 ½) days and will be held at meeting space in the Cincinnati-Dayton-Northern Kentucky region. Each of the meetings may include up to 100 participants.

Oversight of coordination for the meetings will be provided by the EPA WA COR and/or EPA technical lead(s) to be identified by the EPA WA COR once a contractor work plan has been approved. The EPA WA COR and EPA technical lead(s), as assigned, shall receive copies of all deliverables under these tasks. Once confirmed, date(s), topic, facility/location and specific logistical support needed (from among the following subtasks) for each meeting will be provided to the contractor via written technical direction from the EPA WA COR.

NOTE: For estimation purposes, EPA expects support required for each of these four (4) meetings to be similar in level of effort to support provided by the contractor for the EPA/WBI Water and Energy Nexus Technology Innovation Forum held in Dayton and Cincinnati, OH, on October 5-6, 2011 (under Contract EP-C-08-010, Work Assignment 2-44). However, EPA will not require an on-site note taker or meeting summary report for these meetings.

#### **TASK 3.1: Meeting Planning**

The contractor shall participate in conference calls with the EPA WA COR, EPA technical lead(s), and other planning group members. The contractor shall interact with EPA and other external planning group members to help synthesize and formulate meeting topics, agendas, and recommendations for expert speakers. The contractor shall develop interim meeting agendas and materials consistent with the planning group recommendations and short summaries of the topics discussed and any decisions or action items. The contractor shall also participate in periodic calls (approximately twice per week) with the EPA WA COR and/or EPA technical lead(s) to discuss progress and relevant technical issues related to the work assignment tasks. The contractor shall help recruit potential speakers and meeting participants as outlined in this PWS.

#### **TASK 3.2: Pre-Meeting and Registration Materials**

For each meeting, the contractor shall develop draft and final agendas, announcements/invitations, speaker guidelines, logistical information sheets, and other materials as

needed. The contractor shall provide draft versions of all materials to the EPA WA COR and/or EPA technical lead(s) for review and approval. Final electronic copies shall be sent in source file format (e.g., MSWord 2007) and \*.pdf. As necessary, the contractor shall develop 508 compliant .pdf files or .html versions of final materials for inclusion on a registration web site or other sites. In some cases, the contractor shall be responsible for uploading these materials to a registration web site or other related web sites, as access permits.

For each meeting, the contractor shall compile a spreadsheet or mailing list of email addresses for potential meeting participants. These lists shall include potential participants as provided by EPA; the lists may also include potential participants researched and identified by the contractor based on criteria supplied by EPA. The contractor shall distribute (via email) electronic invitations, agendas, logistical materials, and other pre-meeting informational materials to potential participants. The contractor shall forward hard-copy invitation materials only as needed.

The contractor shall develop an on-line registration system for tracking responses and registrant information for each meeting. The on-line system shall also include agendas, and other meeting or logistical information. The contractor shall make regular updates to the system to reflect changes in the agenda, schedule, logistics, etc., and shall post meeting-related announcements as available. The system may be linked to EPA or other relevant web sites as identified by the EPA WA COR. The contractor shall also manually enter responses into the registration system as needed. The contractor shall track responses to meeting invitations and monitor on-line registration, and shall provide the EPA WA COR or EPA technical lead(s) with regular updates on registration and responses. The contractor shall provide the EPA WA COR with materials to handle walk-in (non-preregistered) participants onsite at the meetings (see subtask 3.3 below).

### **TASK 3.3: Meeting Folders, Name Badges, and Other Materials/Handouts**

For each meeting, the contractor shall prepare up to 100 folders to distribute to meeting participants. The folders shall contain copies of final agendas, participant lists, speaker bios, and additional fact sheets as needed. Additionally, the folders may contain copies of available presentations, abstracts, evaluation forms, other newsletters or handouts, etc., as determined by the EPA WA COR or EPA technical lead(s). The contractor shall design and produce labels or covers for the folders. The contractor shall copy materials to be included in the folders; however, in some cases, EPA may provide materials that should be added to the folders. In addition to hard copy materials, the contractor shall be prepared to upload all final meeting materials to the workshop registration site and/or to provide materials to EPA for uploading on other web sites prior to the meeting.

For each meeting, the contractor shall develop name badges, exhibitor lists, directional signs, table tents, onsite registration lists and forms, sign-up sheets, evaluation forms, and other registration- and meeting-related materials, as needed. The contractor shall provide services for design and production of meeting-specific artwork and graphics to use on name badges, agenda, signage, posters, presentation templates, etc. The contractor shall

provide copies of draft artwork and graphics to the EPA WA COR or EPA technical lead(s) for approval before final production.

The contractor shall ship all meeting materials specified in this subtask to the EPA WA COR or EPA technical lead(s) in advance of the meeting. The contractor shall track shipment of materials to ensure they arrive safely and in good condition to the designated EPA or facility addressee. The contractor shall provide return shipping information and supplies in the event that any materials need to be returned to the contractor by the EPA WA COR or EPA technical lead(s).

#### **TASK 3.4: Speaker Arrangements**

Prior to each meeting, the contractor shall provide support to identify and contact potential speakers, panel members, etc. The contractor shall initiate contact with speakers to determine willingness to participate and confirm availability, as needed. The contractor shall develop meeting-specific presentation templates (e.g., in PowerPoint) to provide to speakers [Note: presentation templates and associated graphics should be pre-approved by the EPA WA COR or EPA technical lead(s) as outlined for pre-meeting materials under subtasks 3.2 and 3.3 above]. The contractor shall provide written (email) guidance to and contact speakers for submission of electronic presentation materials (i.e., PowerPoint slides), abstracts, and short biographies as needed.

Once presentations and other speaker materials have been received, the contractor shall reformat as necessary for copying, uploading and distributing (or posting on web sites). The contractor shall make all speaker presentations available to the EPA WA COR or EPA technical lead(s) prior to the start of the meeting via CD-ROM or other appropriate electronic media (USB drive), or through email and/or an Internet file-sharing platform. The contractor shall notify speakers who do not submit their presentations prior to the meeting to bring a copy of their electronic file to the meeting.

As necessary following the meeting, the contractor shall make all presentation files 508 compliant for purpose of posting them to the meeting registration web site or other web sites as applicable. The contractor shall post 508 compliant presentations and other materials as specified by the EPA WA COR or EPA technical lead(s) to the meeting registration web site within one (1) week from the conclusion of the meeting. The contractor shall prepare and forward a CD-ROM containing all 508 compliant presentations and other materials from each meeting (abstracts, bios, presentations, etc.) to the EPA WA COR and EPA technical lead(s) within two (2) weeks from the conclusion of the workshop.

As necessary, the contractor shall obtain expert guest speakers to provide presentations relevant to the meeting topics and materials and based on expertise criteria provided by EPA and planning group members. Details on the specific number of and criteria for expert speakers for each meeting will be provided via written technical direction from the EPA WA COR. The EPA WA COR or EPA technical lead(s) shall have final approval of guest speakers identified for each meeting. The contractor shall provide written guidance to speakers for submission of presentations and other materials as outlined

above. The contractor's work plan shall include estimates to provide all costs associated with obtaining up to three (3) expert speakers to participate at meetings to be held in the Cincinnati-Dayton-Northern Kentucky region.

#### **TASK 3.5: Remote Conferencing and Webinar Services**

For up to two (2) of the meetings identified in Task 3, the contractor shall arrange for webinar services to allow for off-site meeting participation. The contractor shall be responsible for hosting webinar events and materials or accessing a webinar service or site to manage these activities. The contractor shall send instructions for accessing any tele-, video-, or webinar conferencing to workshop participants and shall be responsible for uploading workshop materials and presentations to a registration web site or webinar service/site for access during the workshop. The contractor shall be responsible for tracking attendees who participate via webinar services and obtaining registration information from these participants.

#### **TASK 3.6: Meeting Evaluation Reports**

For each meeting, the contractor shall prepare a brief summary report of comments received on evaluation forms from meeting participants. At each meeting, the completed evaluation forms will be collected by the EPA WA COR or EPA technical lead(s) and copies will be mailed to the contractor. The contractor shall provide an electronic copy of the source file (e.g., MSWord 2007) for the summary evaluation report to the EPA WA COR and EPA technical lead(s) within two (2) weeks from receipt of copies of the completed evaluation forms from the EPA WA COR or EPA technical lead (s).

#### **TASK 4: Large Workshop Support**

In support of EPA's role in the WTIC and related activities, EPA plans to hold one larger workshop on technology research, development and implementation. The contractor shall provide logistical and technical meeting support for one (1) workshop for a period of performance through November 30, 2012. Under Task 4, the contractor shall provide all meeting logistical support outlined previously under Task 3 (and related subtasks). Additionally, the contractor shall be prepared to provide the additional support outlined in Task 4 and related subtasks.

The workshop will be held between January 2012 and November 2012, will last one (1) to one-and-half (1 ½) days, will be held at a meeting facility space in the Cincinnati-Dayton-Northern Kentucky region, and may include up to 150 participants.

Oversight of coordination for the workshop will be provided by the EPA WA COR and/or EPA technical lead(s) to be identified by the EPA WA COR once a contractor work plan has been approved. The EPA WA COR and EPA technical lead(s), as assigned, shall receive copies of all deliverables under these tasks. Once confirmed, date(s), topic, and targeted location for the workshop will be provided to the contractor via written technical direction from the EPA WA COR.

NOTE: For estimation purposes, EPA expects support required for this workshop to be similar in level of effort to support provided by the contractor for the EPA and WTIC Water Challenges Workshop held in Cincinnati, OH, on May 23, 2011 (under Contract EP-C-08-010, Work Assignment 2-44).

#### **TASK 4.1: Meeting Space and Audiovisual Equipment**

For the above workshop, the contractor shall make all facility and audiovisual arrangements, including the following:

- Identify and submit a recommendation to the EPA WA COR or EPA technical lead(s) on hotels or conference centers in the Cincinnati/Dayton (OH) or Northern Kentucky region capable of providing meeting space to accommodate a workshop of up to 150 participants. In some cases, it might be necessary to accommodate concurrent sessions or smaller, break-out session meeting rooms. A registration area is also needed. Guidance on which city to target for locating meeting space will be sent to the contractor via written technical direction from the EPA WA COR or EPA technical lead(s). In some cases, the contractor shall also identify a hotel room block (at government per diem rates) either at the same hotel as workshop or in vicinity to accommodate up to 30 workshop participants. EPA will confirm the need for a hotel room block and estimated number of rooms needed via written technical direction.

- Identify and submit a recommendation to the EPA WA COR or EPA technical lead(s) addressing audiovisual (AV) and other equipment/support needs. This recommendation shall include digital audiotape recording of each workshop. EPA anticipates that the following equipment may be needed in each room in which workshop presentations are made: a computer (laptop preferred); wireless mouse; projector and screen; podium and lavalier microphones; podium with light; laser pointer; functional audio/speaker system; flip charts; power strips; appropriate computer, electrical, and audio cables; and wireless internet access (if available). Other equipment and backups shall be recommended and provided as appropriate. The contractor shall also be prepared, if needed, to set up teleconferencing and/or webinar services for the workshop. The contractor shall discuss AV and other equipment needs with the EPA WA COR or EPA technical lead(s) prior to the workshop. Based on the contractor's recommendations, technical direction will be provided by the EPA WA COR specifying AV and other equipment needs for the workshop.

- If necessary and allowed by the facility, arrange for outside AV equipment or support to supplement AV equipment/support provided by a meeting facility if it does not meet the needs for the workshop.

- Once approved by EPA and as necessary, the contractor shall negotiate and sign a contract(s) to obtain meeting space, secure AV equipment and onsite support, and establish a hotel room block.



- Provide pre-, onsite, and post-workshop logistical support with the approved hotel/facility and AV provider, including preparing meeting space and ensuring that onsite AV support is coordinated through the hotel or conference center, as necessary.
- Review invoices and pay for meeting space and AV equipment/support following workshop completion.

Note: In the event that a workshop is to be held at an EPA or other Federally-owned or operated facility and that onsite facility staff are under contract to EPA or other Federal host organization, the contractor shall not initiate discussions with onsite facility staff until appropriate contract officer(s) approval and participation in discussions is obtained, and until notification of approval is received from the EPA WA COR.

#### **TASK 4.2: Onsite Workshop Support**

For the workshop, the contractor shall provide all necessary onsite logistical support, including registering attendees, distributing name badges and other workshop materials, ensuring speakers are present, cueing speakers presentations, trouble-shooting with the facility, initiating remote or webinar conferencing capabilities, and other general logistical support needed for the workshop. The contractor shall coordinate with the meeting facility and onsite facility staff before, during, and after the workshop. [Note: As previously stated, in the event that a workshop is to be held at an EPA or other Federally-owned or operated facility and that onsite facility staff are under contract to EPA or other Federal host organization, the contractor shall not initiate discussions with onsite facility staff until appropriate contract officer(s) approval and participation in discussions is obtained, and until notification of approval is received from the EPA WA COR.]

At a minimum, the contractor shall provide one (1) effective onsite note-taker to record meeting minutes, summary points, action items, and discussion items; and one (1) additional onsite logistics coordinator with experience in convening technical meetings and performing registration activities. On an as needed basis, the contractor shall also provide a meeting facilitator(s) with experience facilitating technical meetings or workshops. In addition, the contractor shall provide AV support staffing and/or coordinate with onsite facility AV staff during the workshop, and shall provide digital audiotape recording of workshop proceedings.

The contractor shall synthesize information onsite (and provide to the EPA WA COR or EPA technical lead), including action item lists, brief summaries, report outs, etc., as needed. If not developed onsite at the workshop, the contractor shall develop draft action items and forward to the EPA WA COR and EPA technical lead within one (1) week from the conclusion of the workshop. At the conclusion of the workshop, the contractor shall collect completed evaluation forms from participants. Any original completed evaluation forms shall be forwarded to EPA following the conclusion of the workshop.

The contractor shall be prepared to handle walk-in (non-preregistered) workshop participants, including accommodating for onsite registration forms, blank name badges, etc. As applicable, the contractor shall update the final workshop participants list based on information collected during registration and forward to the EPA WA COR and EPA technical lead(s).

Within one (1) week of the conclusion of the workshop, the contractor shall prepare and forward the following deliverables to the EPA WA COR and EPA technical lead(s): one (1) CD-ROM (or other appropriate electronic media) containing the final post-workshop participants list (updated based on actual attendees and walk-in registrants), final versions of all agendas (formatted), final speaker and/or participant biographies (formatted), electronic copies of posters displayed at the workshop, sign-in sheets, presentation templates (formatted), onsite walk-in registration forms, and any other final materials from the workshop.

Within two (2) weeks of the conclusion of the workshop, the contractor shall prepare to forward one (1) digital audio recording of the workshop proceedings on appropriate electronic media (e.g., CD) to the EPA WA COR and EPA technical lead(s).

#### **TASK 4.3: Workshop Summary Report**

The contractor shall prepare a draft and final workshop summary report highlighting workshop presentations, discussion points, panel discussions, question and answer sessions, and final action items. The contractor shall submit electronic copies of the draft summary report, in source file (e.g., MSWord 2007) and \*.pdf formats, to the EPA WA COR and EPA technical lead(s) for initial review and comment. The draft summary report shall be submitted to the EPA WA COR and EPA technical lead(s) within two (2) weeks from the conclusion of the workshop. The contractor shall also send the draft summary report to appropriate planning group members, workshop speakers or other parties as necessary for review and comments.

The contractor shall receive comments, follow up on comments as necessary with reviewers or EPA, and revise the draft summary report. The contractor shall format the final summary report. The contractor shall provide the EPA WA COR with the final summary report within one (1) week from the deadline for receipt of comments from all reviewers. The contractor shall have the report edited prior to submitting to EPA. The final meeting summary report should be provided to the EPA WA COR and EPA technical lead(s) electronically, in source file (e.g., MSWord 2007) and \*.pdf formats, and (1) one hard-copy to the EPA WA COR.

EPA anticipates that up to two (2) review cycles shall be needed to finalize the workshop summary report.

The contractor develop an electronic version of the workshop summary report that is suitable for posting to EPA's web site as well as other related web sites. This electronic version shall comply with Section 508 of the Rehabilitation Act, as well as any other standards or guidance set or required by EPA NRMRL.

#### **TASK 5:      Webinar Support**

In addition to the meeting and workshop outlined in Tasks 3 and 4 above, the contractor shall provide logistical and technical support for up to two (2) webinars related to technology development and commercialization. Each webinar will be held between January 2012 and November 2012, will last up to one (1) day, and will include up to 150 participants. For each webinar, the contractor shall provide the following support:

- Make all necessary arrangements for setting up and conducting webinar services
- Host webinar events/materials on own site or provide access to a webinar service or site to manage these activities
- Develop draft and final invitations, agendas, logistical information sheets, and other materials for webinars, as needed; provide draft versions of all materials to the EPA WA COR and/or EPA technical lead(s) for review and approval
- Post .pdf or .html versions of final materials on the webinar site or other web sites
- Distribute (via email) electronic invitations, agendas, logistical materials, and other pre-webinar informational materials to potential participants
- Track participant responses and registrant information for webinars, e.g., through an on-line registration system or some other mechanism, and provide the EPA WA COR or EPA technical lead(s) with regular updates on confirmed participants for each webinar
- Develop guidelines for submission of webinar presentations to the contractor or uploaded directly to the webinar site and distribute guidelines to speakers
- Contact speakers for submission of presentation materials, abstracts, and short biographies as needed
- As needed, upload any speaker presentations, webinar materials, or other information to the webinar site or other web sites prior to the start of the webinar
- Send instructions for accessing webinar conferencing to participants
- Provide logistical support before and during webinars to ensure functionality and trouble-shoot in the event of any issues
- Provide one (1) effective note-taker to participate in webinars and record meeting minutes, summary points, action items, and discussion items.
- Prepare and forward an original and duplicate CD-ROM containing all presentation materials from each webinar (abstracts, bios, presentations, etc.) to the EPA WA COR and EPA technical lead(s) within one (1) week from the conclusion of the webinar
- Prepare a draft and final webinar summary report highlighting key points from presentations, discussion periods, question and answer sessions, and action items
- Submit electronic copies of the draft summary report (in source file format) to the EPA WA COR and EPA technical lead(s) and webinar presenters within one (1) week from the conclusion of each webinar, and the final summary report within three (3) weeks from conclusion of each webinar.

#### **TASK 6:      Development of Technology Transfer Documents and Materials**

In keeping with NRMRL's goal of supporting the development and implementation of innovative technology solutions, the contractor shall provide support to develop, finalize

and produce technology transfer documents and materials. These materials may include fact sheets, technical posters, handouts, or other general informational materials to inform others about EPA's collaborative approaches to technology research, development, and deployment and participation in the WTIC. In general, technical content for inclusion in these technology transfer documents and materials will be provided by the EPA WA COR or EPA technical lead(s) or can be synthesized from existing documents or resources. EPA anticipates that up to four (4) fact sheets/handouts (1-2 pages in length) and up to four (4) posters will need to be developed by the contractor.

The contractor shall submit electronic copies of all draft documents, posters or materials, in source file (e.g., InDesign, MSWord 2007) and \*.pdf formats, to the EPA WA COR and EPA technical lead(s) for initial review and comment. The contractor shall receive comments on draft materials, revise materials accordingly, and resubmit materials to the EPA WA COR and EPA technical lead(s) within one (1) week from receipt of comments. The contractor shall submit final, formatted materials to the EPA WA COR and EPA technical lead(s) electronically, in source file (e.g., MSWord 2007) and \*.pdf formats. The contractor shall have all materials edited prior to submitting to EPA. The contractor shall develop electronic copies of materials that are suitable for posting to EPA's WTIC web site as well as other WTIC related web sites. These electronic copies shall comply with Section 508 of the Rehabilitation Act, as well as any other standards or guidance set or required by EPA NRMRL.

## **DELIVERABLES AND PROJECT SCHEDULE**

All deliverables shall be submitted to the EPA WA COR according to the following schedule.

|  |   |
|--|---|
| <b>TASK 1: Prepare Work Plan</b>   |   |
| Work plan due  | In accordance with the contract clauses   |
| <b>TASK 2: Work Assignment Kick-Off Meeting</b>                                |   |
| Kick-off meeting (via conference call)   | Within two (2) weeks of work assignment issuance  |
| <b>TASK 3: Meeting Logistical Support</b>                                      |   |
| <b>On-going through 11/30/12</b>   |   |
| <b>Subtask 3.1: Meeting Planning</b>   | Commence immediately upon work plan approval; on-going through 11/30/12 for each of the four meetings per technical direction from EPA WA COR |
| <b>Subtask 3.2: Pre-Meeting and Registration Materials</b>                     | On-going through 11/30/12 for each of the four meetings per technical direction from EPA WA COR   |
| <b>Subtask 3.3: Meeting Folders, Name Badges, and Other Materials/Handouts</b> | On-going through 11/30/12 for each of the four meetings per technical direction from EPA WA COR   |
| <b>Subtask 3.4: Speaker Arrangements</b>                                       | On-going through 11/30/12 for each of the four meetings per technical direction from EPA WA COR   |
|  | For each of four meetings: CD-ROM (or other media) containing 508 compliant presentations   |

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|  | and other materials due within two (2) weeks from the conclusion of the meeting  |
|  | For each of four meetings: posting of 508 compliant presentations and other materials to the registration web site within one (1) week from the conclusion of the meeting  |
| <b>Subtask 3.5: Remote Conferencing and Webinar Services</b> | On-going through 11/30/12 for each of two meetings per technical direction from EPA WA COR   |
| <b>Subtask 3.6: Meeting Evaluation Reports</b>               | For each of four meetings: summary evaluation report due two (2) weeks from receipt of evaluation forms from EPA WA COR  |
| <b>TASK 4: Large Workshop Support</b>                        | <b>On-going through 11/30/12</b>   |
| <b>Subtask 4.1: Meeting Space and Audiovisual Equipment</b>  | On-going through 11/30/12 per technical direction from EPA WA COR  |
|  | On-going through 11/30/12 per technical direction from EPA WA COR  |
|  | Draft action items due within one (1) week from conclusion of workshop (final action items included in summary report under subtask 4.3)   |
| <b>Subtask 4.2: Onsite Workshop Support</b>                  | One (1) CD-ROM (or other media) containing final copies of participants list, agendas, biographies, posters, sign-in sheets, presentation templates, walk-in registration forms, and any other materials due within one (1) week from conclusion of workshop |
|  | One (1) digital audio recording of the workshop proceedings on appropriate electronic media due within two (2) weeks from conclusion of workshop   |
| <b>Subtask 4.3: Workshop Summary Report</b>                  | Draft report due two (2) weeks from conclusion of workshop; final report due one (1) week from deadline for receipt of comments from reviewers   |
|  | 508 compliant report files due one (1) week from submission of final report files to EPA   |

| <b>TASK 5: Webinar Support</b>   |  |
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| Support for up to two (2) webinars   | On-going through 11/30/12 for each of two webinars per technical direction from EPA WA COR   |
|  | For each of two webinars: original and duplicate CD-ROM containing all presentation materials from each webinar due within one (1) week from conclusion of webinar |
|  | For each of two webinars: draft summary due one (1) week from conclusion of webinar; final summary report due three (3) weeks from conclusion of webinar           |
| <b>TASK 6: Development of Technology Transfer Documents and Materials</b>  |  |
| Development of materials, including fact sheets, posters, handouts, etc., up to four fact sheets/handouts and four posters | On-going through 11/30/12 per technical direction from EPA WA COR  |

## **DELIVERABLE ACCEPTANCE CRITERIA**

The following deliverable acceptance criteria will be used to assess deliverables submitted under Tasks 1 through 6 of this PWS.

All deliverables shall be submitted to the EPA WA COR according to schedule and in appropriate formats as outlined in the PWS. All electronic materials should be complete and of high production quality. Reports shall be edited by a technical editor prior to submission to the EPA WA COR. All electronic materials shall comply with Section 508 of the Rehabilitation Act, as well as any other standards or guidance provided through written technical direction from the EPA WA COR.

## **SPECIAL REPORTING**

The contractor's Monthly Progress Report shall include a detailed description of any technical direction issued by the EPA WA COR and accepted by the contractor. The contractor shall maintain a list of all accepted technical direction issued during the work assignment. The contractor's Monthly Progress Report shall also include a break-out of cumulative costs (LOE, ODCs, etc.) associated with performing each of the Tasks 1 through 6 as outlined in this PWS. Additionally, the contractor's progress report shall include:

- A breakout of LOE/costs per meeting for each of the four (4) meetings outlined in Task 3, and then per subtask under Task 3 (for each of the meetings)
- A breakout of LOE/costs for the workshop outlined in Task 4, which should include LOE/costs associated with each subtask under both Tasks 3 and 4
- A breakout of LOE/costs per webinar for each of the two (2) webinars outlined in Task 5.

## **MANAGEMENT CONTROLS**

Technical direction will be provided by the EPA WA COR throughout performance of the PWS. Periodic meetings between the EPA WA COR and contractor are encouraged to discuss any questions that may arise during the performance or completion of this work assignment. At the EPA WA COR's discretion, these meetings may occur via teleconference or video conferences. The contractor shall document these meetings and submit copies of this correspondence to the EPA WA COR.

The EPA WA COR may identify one or more EPA technical lead(s) for this work assignment. Interaction between the contractor and any EPA technical lead(s) designated by the EPA WA COR is solely for the purpose of presenting and discussing the information, analyses, results or presentations related to this work assignment. The interaction will be technical communication, not technical direction. Per the technical direction clause EPAAR 1552.237-71 of the contract, the EPA PO COR and the EPA WA COR or alternate EPA WA COR are the only representatives of the CO authorized to provide technical direction.

In all meetings, conferences, symposia, etc. participated in as a part of satisfying the terms of this work assignment, contractor personnel shall be clearly identified through the use of name badges that indicate their corporate affiliation. Contractor personnel shall clearly identify themselves as contractors when contacting workshop participants, speakers or other individuals or organizations during the performance of this effort.

The contractor shall ensure that the work done under this project does not contain any real or apparent personal or organizational conflicts of interest.

The contractor shall maintain the confidentiality of any confidential business information collected as part of this effort.

The contractor shall comply with Government Printing Office guidelines during the performance of this effort.

The contractor shall comply with Paperwork Reduction Act guidelines during the performance of this effort.

The contractor shall inform the EPA WA COR verbally or in writing within two (2) business days if any significant problems arise, as well as any corrective actions and potential impacts on project deliverables, costs, etc.

## **TRAVEL**

Per the contract clause Local LC-31-08, Approval of Contractor Travel, any non-local travel directly chargeable to this work assignment shall be submitted and approved by the proposed travel dates as identified by the EPA WA COR via technical direction. It is expected that the contractor will be requested to participate at meetings to be held in the

Cincinnati-Dayton-Northern Kentucky region between January 2012 and November 2012.